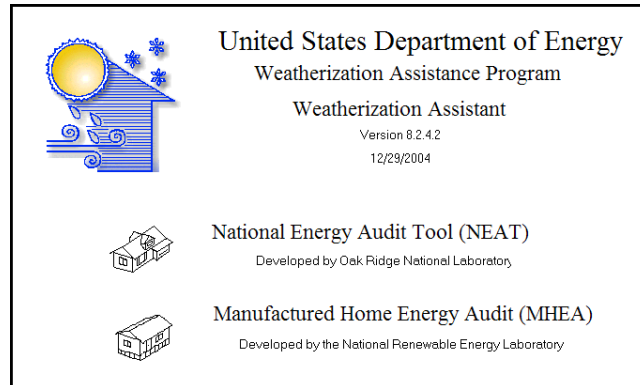


NEAT Features

Check In / Check Out



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1

NEAT Features - Check In / Check Out

Each machine that is going to be taken out into the field appears to need the following things implemented before doing the first check in / check out. These steps will smooth the way for subsequent use.

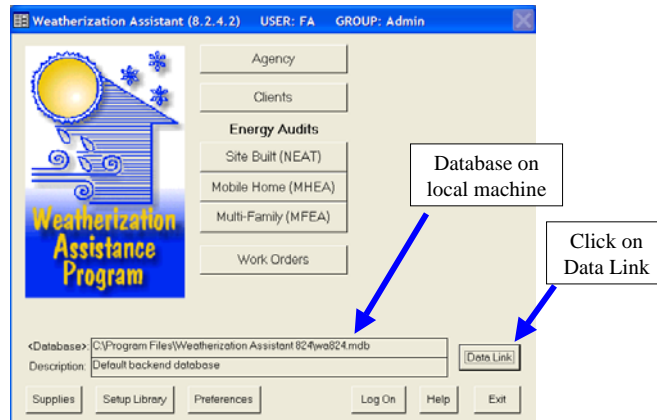
1. Create your agency in the local version of the database (wa824.mdb) that can be found in the path "C:\Program Files\Weatherization Assistant 824" on the laptop or tablet computer (field computer).
2. Set up at least the agency contacts that will be using the field computer in the check in / check out mode. Use the exact same contact info that is set up for those people in the network backend database.
3. Create a copy of the supply library for your agency on the field computer. This is really only required if the user intends to run the audit to generate recommendations while not connected to the network backend database. The supply library doesn't currently appear to get dragged along to the field computer during the check-out / check-in process.

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2

NEAT Features - Check In / Check Out

Local database is set up on the laptop or tablet computer (field computer) with the steps on the previous slide already performed. In this example the current user is an agency contact named Field Auditor. Click on Data Link to go through the process to re-connect to the network backend database. This process is described in the file “NEAT Connection to Network Database.pdf”

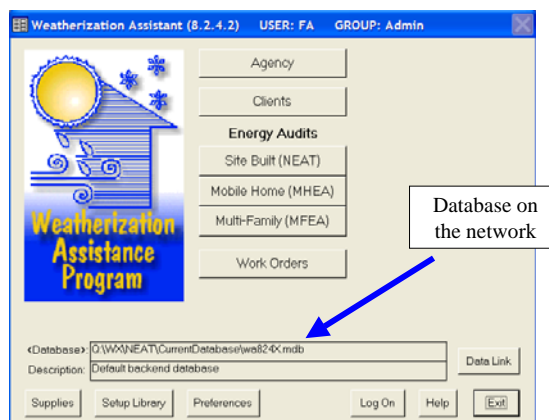


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3

NEAT Features - Check In / Check Out

After going through the Data Link process and connecting to the network database, that new database is shown on the Main screen. This is the database from which Client records will be checked out.



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NEAT Features - Check In / Check Out

This example uses Anoka County Community Action Program as the agency. There are three clients currently in the network database, with two of them having audits downloaded from eHEAT.

Agency

Agency Name: Anoka County Community Action Prog State: MN

Address: 1234 5th Street City: Anoka MN 55555-1212 Email: auditors@anoka.com

Agency Type: Local Community Action Agency

Federal ID Num: EIN: Other ID Num: Comment:

Web Page URL: ☐ Default agency to associate with new Client Work Order. Library, and Supply records. Checking this will automatically UNcheck this box for all other Agency records (ie. Only one Agency record can be the Default record).

AGENCY by Name: 1 of 5 Copy Del

REPORT Select Report: Scheduled Audits Select Clients: 1 selected

Preview Print PDF File Snapshot File Explore

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5

NEAT Features - Check In / Check Out

In this example we will check out the two client records (2045 and 3000) that have audits started. This check out process can be performed two different ways. The first way is by checking out each client record individually from the Client screen. The second way is shown starting on Slide 17. Using the first approach, access the Client screen from the Audits tab by double-clicking on Client ID 2045.

Agency

Agency Name Anoka County Community Action State MN

Agency Information | Contacts (20) | Cost Centers (11) | Surveys (0) | Clients (3) | Audits (2) | Work Orders (1) | Status History |

	<Client ID>	Alt. Client ID	<Audit Name>	Type	Last Edited	Status
▶	2045	271	NEAT	12/29/2004	Site Visit Completed On	
	3000	239	NEAT	12/27/2004	Site Visit Scheduled For	

Double-click on the the Client ID record

Record: 1 of 2

Read Only - Use for Sort/Find

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6

NEAT Features - Check In / Check Out

This opens the Client screen. Click the Check Out button to check out the client record to FA, which is the currently logged in user.

The screenshot shows the 'Client' window for Client ID 2045, named JOHNSON, BRUCE O. The window has tabs for Client Information, Status, Energy Index, Contacts (1), Audits (1), Work Orders (0), and Surveys (0). The Client Information tab is active, showing fields for Agency (Anoka County Community Action Pro), State (MN), Address (555 Lane), Unit Number (#2), City (KARLSTAD), State (MN), Zip Code (56732-), County (Anoka), and Other Geographic Identifier. There are also fields for Dwelling Type (Site Built), Ownership (Rented), Primary Heating Fuel (Oil), Secondary Heating Fuel, and Year Built. A 'Checked Out To' dropdown menu is set to 'FA'. A blue arrow points to the 'Check Out' button, with a callout box saying 'Click the Check Out button'. Other buttons include 'Check In', 'Cumulative Cost', 'SIR', and a 'REPORT' section with 'Select Report' (Client Completion Report) and buttons for Preview, Print, PDF File, Snapshot File, and Explore.

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NEAT Features - Check In / Check Out

The client record is now checked out to user FA. You can also pick a different user from the drop-down list of who checked-out to, but logged in user is selected by default.

This screenshot shows the same 'Client' window, but the 'Checked Out To' dropdown menu is now set to 'FA'. A blue arrow points to the dropdown menu, with a callout box saying 'Drop-down list'. The 'Check In' and 'Check Out' buttons are still visible. The rest of the form fields and the 'REPORT' section remain the same as in the previous screenshot.

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NEAT Features - Check In / Check Out

Follow the same process for Client ID 3000. Either close the previous screen and double-click on Client ID 3000 from the Audits tab (below) to open the Client screen again, or navigate to Client ID 3000 from the Client search in the lower left corner of the Client screen.

The screenshot shows the 'Agency' window for 'Anoka County Community Action' in 'MN'. The 'Audits' tab is active, displaying a table of client audits.

<Client ID>	Alt. Client ID	<Audit Name>	Type	Last Edited	Status
2045		271	NEAT	12/23/2004	Site Visit Completed On
3000	wx3000-1	239	NEAT	12/27/2004	Site Visit Scheduled For

Record: 14 of 2

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NEAT Features - Check In / Check Out

Client ID 3000 is now checked out to FA also.

The screenshot shows the 'Client' window for Client ID 3000, 'LEIRAN, HELENE'. The 'Audits' tab is active, showing the client is checked out to 'FA'.

Client Information:

- Client ID: 3000
- Alt. Client ID: wx3000-1
- Agency: Anoka County Community Action Pro
- State: MN
- Address: 1700 WIDMAN LANE #240C
- City: CROOKSTON
- State: MN
- Zip Code: 56716
- County: Anoka

Occupants:

- Number of Occupants: 1
- Elderly: 1
- Disabled: 0
- Native American: 0
- Children: 0
- Primary Language: English

Dwelling:

- Type: Multifamily (5 or more units)
- Ownership: Rented
- Primary Heating Fuel: Wood
- High Energy Use: ☐
- Secondary Heating Fuel: ☐
- High Energy Burden: ☐
- Previously Weatherized: ☐
- Year Built:

Audits:

- Checked Out To: FA
- Check In:
- Check Out:

CLIENT Search:

- by Client ID:
- by Contact Name:
- by Alt. Client ID:

REPORT:

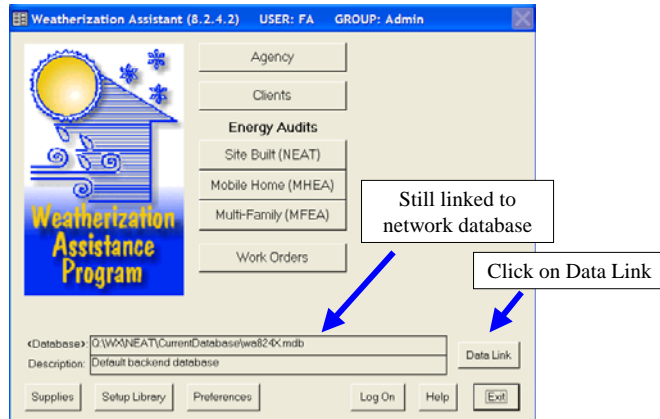
- Select Report: Client Completion Report
- Preview:
- Print:
- PDF File:
- Snapshot File:
- Explore:

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NEAT Features - Check In / Check Out

Return to the main screen and click on Data Link. Still currently linked to the network database.

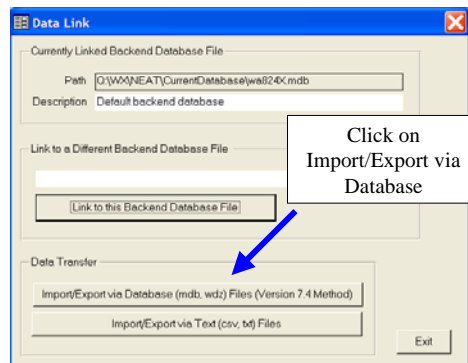


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NEAT Features - Check In / Check Out

Select Import/Export via Database

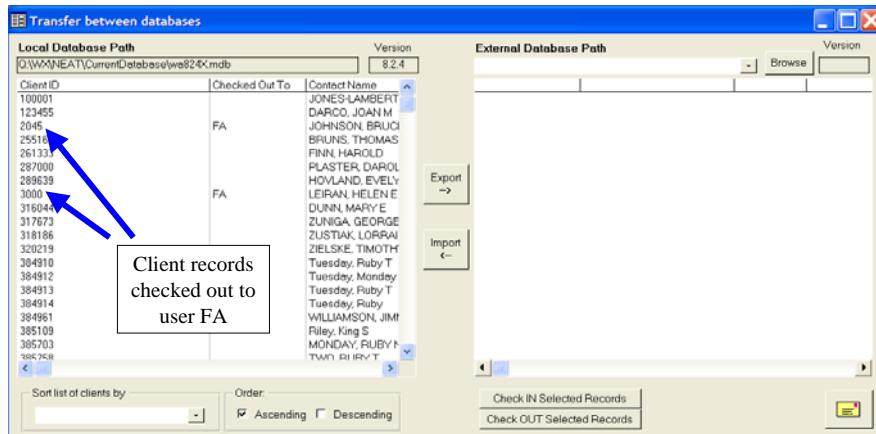


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NEAT Features - Check In / Check Out

Shows client records on the left, including noting which clients (Client IDs 2045 and 3000) are checked out.

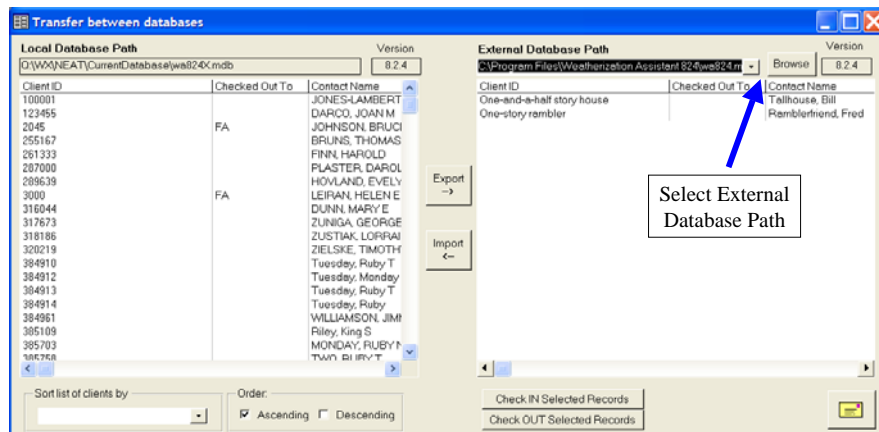


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NEAT Features - Check In / Check Out

Select the external database path TO which the clients are to be copied and checked out to (the path to the database on the field computer), either by clicking on Browse and navigating, or by selecting from the drop-down list.

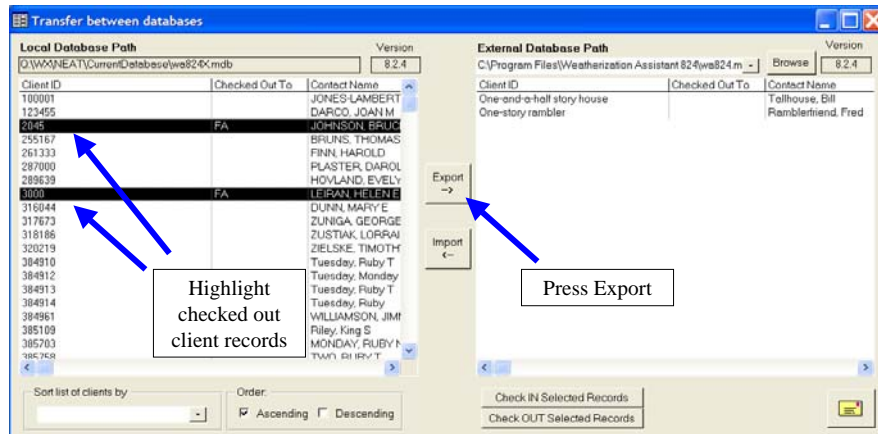


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NEAT Features - Check In / Check Out

Highlight the clients that have been checked out and which want to move to the field computer database. Click on Export. Lower left corner of screen will show progress.

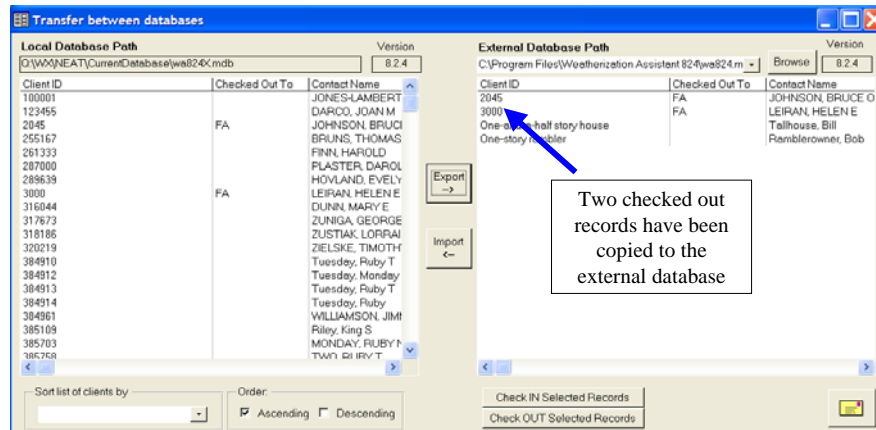


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NEAT Features - Check In / Check Out

When completed, the checked out client records are now also in the database file on the field computer.

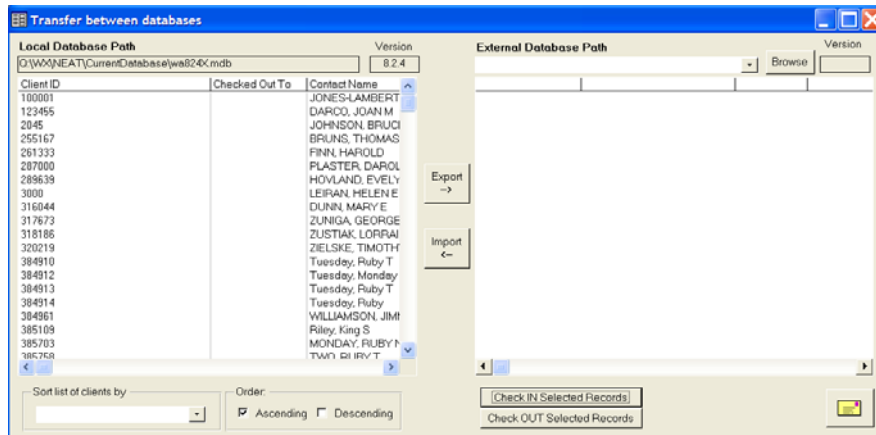


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NEAT Features - Check In / Check Out

The following three slides show the second way that client records can be checked out. Multiple records can be checked out directly from this screen, rather than one at a time from the Client screen.

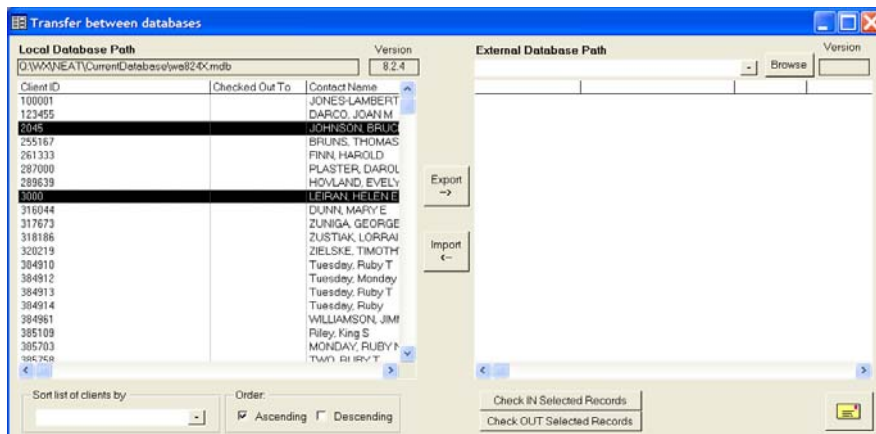


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NEAT Features - Check In / Check Out

Highlight the clients that you want to check out and then press the "Check OUT Selected Records" button at the bottom. Highlighting the records is done by using the mouse to click on a record. Standard Windows methods for selecting multiple records can be used - e.g. press the CTRL key and click on additional individual records to highlight them, or click on a record and then press the SHIFT key and click on another record to highlight all records in between.



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NEAT Features - Check In / Check Out

This produces the same result as shown previously on Slide 13.

Transfer between databases

Local Database Path: G:\WM\NEAT\CurrentDatabase\wb824K.mdb Version: 8.2.4

Client ID	Checked Out To	Contact Name
100001		JONES-LAMBERT
123455		DARICO, JOAN M
2045	FA	JOHNSON, BRUCI
255167		BRUNS, THOMAS
261333		FINN, HAROLD
287000		FLASTER, DAROL
289639		HOVLAND, EVELY
3000	FA	LEIRAN, HELEN E
316044		DUNN, MARY E
317673		ZUNIGA, GEORGE
318166		ZUSTAK, LORRAI
320219		ZIELSKE, TIMOTHY
384910		Tuesday, Ruby T
384912		Tuesday, Monday
384913		Tuesday, Ruby T
384914		Tuesday, Ruby T
384961		WILLIAMSON, JIM
385109		Riley, King S
385703		MONDAY, RUBY T
146768		TAYLOR, GARY T

Export → Import ←

Sort list of clients by: Order: ☒ Ascending ☐ Descending

Check IN Selected Records Check OUT Selected Records

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NEAT Features - Check In / Check Out

Still connected to network database. Select Data Link to connect to local database on field computer.

Weatherization Assistant (8.2.4.2) USER: FA GROUP: Admin

Agency Clients Energy Audits Site Built (NEAT) Mobile Home (MHEA) Multi-Family (MFEA) Work Orders

Database: G:\WM\NEAT\CurrentDatabase\wb824K.mdb Data Link

Description: Default backend database

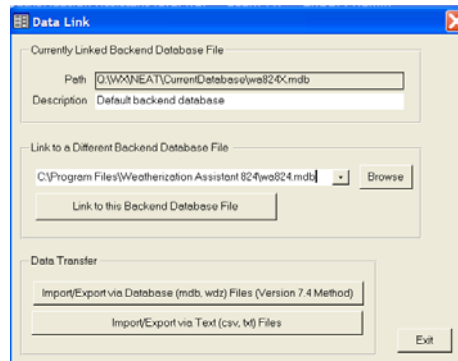
Supplies Setup Library Preferences Log On Help Exit

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NEAT Features - Check In / Check Out

Selected the local database and Link to this Backend Database File

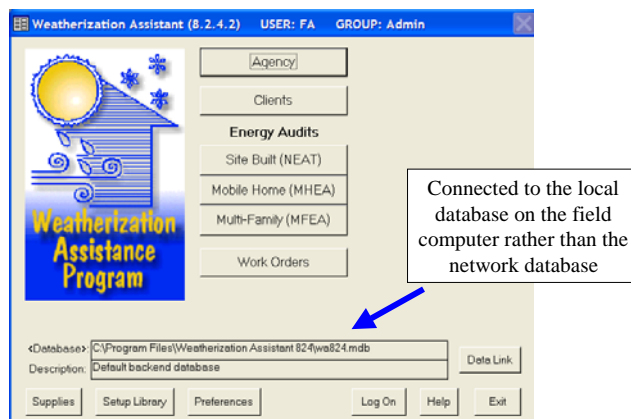


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NEAT Features - Check In / Check Out

After logging back in the user is now connected to the local field computer database.



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NEAT Features - Check In / Check Out

Go to Agency screen to see have 2 client and 2 audit records which were transferred to this database.

The screenshot displays the 'Agency' screen in the NEAT system. The window title is 'Agency'. At the top, there are tabs for 'Agency Information', 'Contacts (20)', 'Cost Centers (11)', 'Surveys (0)', 'Clients (2)', 'Audits (2)', 'Work Orders (0)', and 'Status History'. The 'Agency Information' tab is active.

Agency Name: Anoka County Community Action
State: MN

Agency Type: Local Community Action Agency

Address: 1234 5th Street
City: Anoka
State: MN
Zip Code: 55555-
Phone Number: (651) 555-1212
Fax Number:
E-Mail: auditors@anoka.com
Web Page URL:

Federal ID Num:
ERI:
Other ID Num:
Comment:

☐ Default agency to associate with new Client, Work Order, Library, and Supply records. Checking this will automatically UNcheck this box for all other Agency records (ie. Only one Agency record can be the Default record).

AGENCY
by Name
1 of 3
Copy Del

REPORT
Select Report: Scheduled Audits
Preview Print PDF File Snapshot File Explore
2 selected